What's New in ECS 10.1.5.x

Index of Topics Covered

Pictures

- When picture files are clicked onto via a View screen, they will now open in a separate tab within ECS. Prior to this change, the photo would open in a third-party software, which was not always reliable dependent on the user's settings. To correct this, ECS will now open all picture files in a separate tab directly in ECS. This tab will be titled "Media Image." Right click onto the picture to access options to save, copy, print, email, etc.

Word Setup

- Within word setup, if a user selects a word and chooses the option for "Copy", but this word is a time word that populates to the Sign screen, it will instead automatically prompt for a "Copy/Auto-Set." This will occur on any words that on the Sign tab have a checkmark in "Hour" or Time." This is to assist users in ensuring that newly created time words are added into all the appropriate sign tasks (MAR, TAR, To Do List).

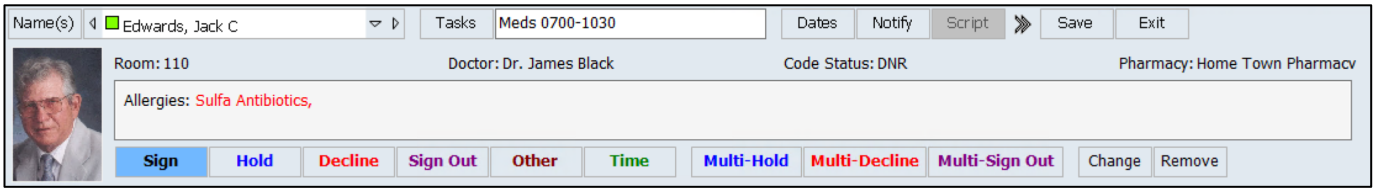
Filter Screen

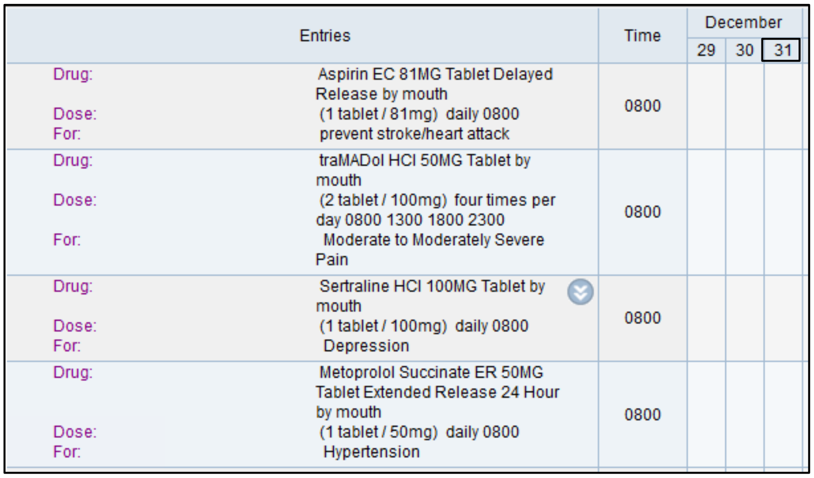
- When in the Name Selection screen or ID/Demographics screen and clicking onto the option for Filter, there used to be a button on this screen labeled "Apply." This button was unnecessary as clicking "OK" provides the same result. The "Apply" button has been removed.

Electronic Sign (MAR/TAR)

- Several cosmetic changes have been made to enhance the look of the electronic sign screen which is utilized for MAR, TAR, and Nursing To Do Lists. In addition, a few enhancements have been made to
    - **Allergies** have been moved to the top of the screen.
    - The **More…** button has been changed to instead be chevron arrows. Click the chevron arrow to access Reports, Write, View, and Signature.
    - **Side Effects** are now hidden within downward chevron arrows. If a user needs to see the side effects, simply click the downward arrow for that specific order.
    - Each row in the screen has **alternate shading** to help users in differentiating between each order.
    - Today's date has a frame around, to help it stand out to the end user.
    - The buttons for **Sign, Hold, Decline, Sign Out, Other, Time, Change,** and **Remove** have been brought back out to the main screen (rather than hidden in a dropdown menu). This is to assist in end user ease of use.
    - Options have been added for **Multi-Hold, Multi-Decline**, and **Multi-Sign Out**. This is to assist users in signing out multiple cells at one time. Click onto the option needed, click into each of the cells to be signed out, and then click onto **Complete** to flip to the documentation screen.
    - When users click onto an option besides Sign (e.g., Hold, Sign Out, Multi-Decline, etc.), the user's cursor will now change colors to denote what option was selected. This was working in some environments before, but now will work in all instances of ECS.
    - A **Notify** checkbox has been added in the left corner of the Entries box. This will only show for users who have rights to the Notify button in their user group properties. When this is selected, a checkbox appears in the upper left-hand

corner of each order. Once users have checked all orders to be sent via the Notify button, they will click onto **Notify** as they usually would. Holding down the **Ctrl key** on your keyboard and highlighting entries before clicking onto Notify will still work in the same manner as well.





- An "Exception" topic may now be removed from a Sign task. This may be useful if a facility does not want or need users to flip to a documentation screen when they utilize the following options on the Sign screen: Hold, Decline, Sign Out, or Change. To remove an "Exception" topic, click the picklist to the right of the Exception word. Click **OK** (without selecting any sections or topics), click **OK** again to save changes to the task. This could be useful if a Sign task is being used for a CNA flowsheet, Nursing To Do List, or for something other than medication administration.

MDS

- Signifiers have been added to all correction assessments to indicate whether the correction is a modification or an inactivation. This will be displayed in parenthesis to the right of the word Correction with either an "M" or an "I."
- The following buttons have been removed when viewing an MDS via the **View** option: Signatures, Unknown, Note, and Sign Section. Within the Status screen, the option for Collect has been disabled.
- Users will no longer be able to create inaccurate correction assessments.
  - If attempting to correct an inactivation record, the user will receive the following message: *Unable to Correct an inactivation.*

- If attempting to correct a modification record, the user will receive the following message: *The only option allowable of a correction (modification) MDS is to inactivate it. If needing to modify something sent on the original record, instead start a correction on the original assessment.* Click OK to continue adding a correction (inactivation) record. If a user then decides to continue and clicks OK this will open the correction record and will have A0050 pre-filled in with the only acceptable option (3 – inactivate existing record).

- If re-submitting an MDS assessment via Change, the assessment will now close out once it has completed the submission process.
- In Section O, to the right of question O0400, there is a new button for **No Therapy Received.** If a user were to click onto this button, it will automatically mark all questions from O0400A-O0400F2 with "0" or a "^" in the date boxes. This can be used to complete this portion of the MDS more easily for residents who are not receiving any therapies.
- Users are no longer able to create an MDS transmission (batch) file with any MDS assessments that are in a status of "Held."
- An enhancement has been made in the MDS to assist facilities located in **North Dakota** who are required to complete an OSA assessment with each OBRA they complete. This has then been causing for two sets of RUG scores to write-back into the record and therefore two RUG scores pull to billing/calendars/reports. This change will assist those facilities in North Dakota to ensure that only one RUG score writes-back into the record. If a facility has "ND" selected in Site Settings > MDS tab and the assessment type in an OSA, when the user submits the MDS into ECS, they will be presented with three different options (shown below). If a user is in ND and is completing an OSA simultaneously with an OBRA, and therefore does not need anything submitted into ECS, then we recommend the third option is selected.
    - Submit HIPPS Codes and MDS Answers
    - Submit HIPPS Code Only
    - Submit No HIPPS Codes or MDS Answers

MDS 3.0 Report

- The MDS 3.0 Report screen has been re-designed to assist in end user ease of use. In addition, the report will now preview directly within the screen. The overall functionality remains the same and all pre-built tasks will continue to work as they usually had. To use the new screen, a user will begin the upper left-hand corner with selecting name(s) and a task (if they so choose too). If a task is not selected, the options for Filters, Restrictions, Based On, and Period will need to be populated to determine the search criteria. Once all criteria are populated, a user may click **Go** to preview the results. A user may choose to **Print** or **Export** the data once it has loaded.

MDS Manager

- In the Transmit Manager, the column for Z0150 has been removed as this is no longer an option on the MDS since 10/2019.
- There are two new buttons that have been added to the top of the MDS Manager. One for PPS PDPM Analyzer and one for OBRA PDPM Analyzer. These are to provide shortcuts to each of the analyzer tasks. These will only work if the user has rights to these functions.
- A Print button has been added to each of the panels (Held, Transmit, and Scheduling Tool). There is not a way to fit all columns on the printed forms, so below is what each of the sections will display on the printed copy.
    - Held Assessment Panel: Name, MDS, Target Date, Complete Date, CAAs, Unsigned Sections.
    - Transmit Manager Panel: Name, MDS, Target Date, Complete Date, V0200C2, Transmit Date, Status, Z0100, Z0200, Trans. Count.
    - Scheduling Tool Panel includes all columns.

MDS Analytics

- For the Length of Stay report, a slight change has been made to determine when a resident will qualify to be a part of the calculations. Prior this change, a resident's discharge and admission date had to fall within the selected date range to qualify. Now, only the resident's discharge date needs to fall within the selected date range to qualify.

Survey Reports (802 & 672)

- Information that populates into the 802 & 672 survey reports based on "Use MDS" will now look at MDS assessments that are in Pre-CAA mode.

General Reports

- In the Open Report screen, a button for Delete has been added. This is to make it easier for end users to delete reports that are no longer needed.
- A new option is available when populating Demographics via a column field, or a Demographics field for displaying a full name. Prior to this change, the full name field would populate *Last Name, First Name*; however, a new option has now been added which can populate the name as *First Name Last Name*. This new option is titled First Last. The original full name field has been renamed to Last, First.

Graph Reports

- We have updated our program to Delphi10, which allowed for cosmetic changes to **Graph** reports. However, this has made it so that graphs are no longer interactive.
- If there are any missing data points for a month/week/day on a line graph, the line will show as dotted, rather than filled in, which indicates that data points are not available for that time frame.
- Due to the new graph report programming, any reports that are categorized as "General" but that have a graph located somewhere within them (i.e., Daily Census Report), these reports will be updated to now be in the "Graph" category. This means that if users have previously accessed these report types via the green "Reports" icon, they will now have to utilize the green "Graphs" icon. If these types of reports are being viewed via an access button, no changes will be seen by the end user.

Report Tasks

- When editing a report task, there is now a button for **Insert.** This will allow reports to be more easily inserted into a report task, rather than having to clear out all the reports and add them from scratch to get them into the correct order.

HIPPS Code Modification

- When a user launches the HIPPS Code Modification screen, and selects a name, they are then presented with all the MDS assessments. This MDS assessments listed have been updated to no longer include an assessment that does not produce a PDPM HIPPS code. This includes an entry tracking record, a death tracking record, a stand-alone OBRA discharge, and a stand-alone PPS discharge.

Charge Master

- We have enhanced the Fixed Field option within Charge Master so that you only see one row to include the Fixed Field (usually HCPCS) on the same row as the value (usually Medicare (B) or Self Pay). This is useful in updating Therapy rates for clients who have treatments broken down by 1 unit, 2 unit, 3 unit, etc.

Calculating Screen

- When posting an invoice into a locked period, you get a warning asking you to pick a date in an open period. Previously, there was a 2nd message confirming that you want to post all charges to this date, but we have removed that 2nd message.

Journals

- We have changed the Total line in the Journal reports to only show data for columns that are set to Totals. Extra data in the total line has been cleared.

Financial Forms

- When you are in the Open button of Financial Forms (or View Forms from your Access buttons), you will now see a count of how many forms there are total and how many have been selected. We have also renamed the radio buttons to say List All Forms, List Only Held Forms, and List Only Complete Forms. We have also added a column on the right side of the screen called Electronic Claim File which will display the location and file name of the file that was created with the associated form. If a file was batched multiple times, this will display the last file location and file name.
- HCFA 1500s have a setting to populate the 59 modifiers for therapy claims. The current tables have been downloaded for Wisconsin Medicaid only. To turn on this process:
    - Go to the **1500** form.
    - Click the **Setup** button.
    - Click the **Setup Options** tab.
    - Click the **Options** button.
    - Place a checkmark in the **Use 59 Modifier** checkbox.
    - Click **OK**.
    - Click **Apply/Close**.

Electronic Claim Files

- When creating an electronic claim file, we have added a column on the right side of the screen that shows the claims called Electronic Claim File which will display the location and file name of the file that was created with the associated form. If a file was batched multiple times, this will display the last file location and file name.

Aging

- The use of Identifiers on the Aging has been changed a bit. The bug was fixed where if your task had Identifiers in it, it would not work correctly if you had to change dates.
- You are now able to run an aging for one (or more) of the identifiers rather than all identifiers.
    - When you run the aging from an access button, click the **Control** button.
    - Click **OK** (if you do not need to change dates or first change dates and then click OK).

  - When the Identifier box comes up, select one or more Identifiers (likely Insurances).
  - Place a checkmark in the **Selected Only** checkbox and click **OK**.

Auto-Adjustments

- The auto-adjustment process has changed and will now auto-adjust payer sources that were already calculated/posted during the adjustment period and then go back and process any payers that had not been previously calculated. This change is to resolve issues with the liability re-calculating on a payer change. For example, there was an issue where if a resident changed from one Medicaid type payer to another (Hospice Medicaid to Medicaid) the Medicaid screen would not calculate the liability correctly due to the order in which the processing was done. This issue is resolved with this change.

Chart of Accounts

- We have expanded the data that can be displayed in the Chart of Accounts. This is useful in determining what account type an account is set to. In the Chart of Accounts, there is a More/Less button in the bottom left that allows you to expand/collapse this extra information.
- Account numbers can now be set to Active or Inactive. All accounts will default Active. There is also a setting in Setup>General Ledger>File to turn on checking of this status. Additional programming will be completed on the calculating screen to check for Inactive status. At this time, it will not impact billing.
- Within the Define Account Number screen, we added an option called "AP". This will automatically be highlighted when an Expense Account is created. This option is tied to new programming for Accounts Payable which allows an account number to be displayed in a picklist for entering invoices. There is a new checkbox in word properties on the Text Control tab called Chart of Accounts AP that is used to display these types of accounts.
- The Copy button has been changed to Auto-set. Once you add an account number, you may click the Auto-set button, pick a like (mentor) account and you will be displayed a list of locations that the mentor account is found. This list will include Calculated Accounts, Journal Tasks, General Ledger Reports, and Vendor Demographics. You may select all or individual items and click OK. This will add the new account in all places that you have selected. In General Ledger Reports, the new account will appear below the mentor account.
- Within the Define Accounts screen, there is a new Locate button. This may be used to see where the selected account is linked. Linked areas displayed in include General Ledger Reports, Calculated Accounts, Journal Tasks, and Vendor Demographics. To

use this, in the chart of accounts, select and account and click Edit. Click the Locate button in the bottom right to see where that account is linked.

General Ledger Reports

- There is a change to running General Ledger Reports. When you run a General Ledger report, you will automatically get a General Ledger Reports tab and a Preview tab. The Preview tab will preview the General Ledger report in a PDF format. The General Leger Reports tab was the screen that used to be presented and the user would have to click Preview. The General Ledger Reports tab has also had the background color removed.
- When General Ledger Reports run, a box displays with a list of accounts that are not within the report setup. This box now only pops up if you go to the Options button on the General Ledger Report screen and place a checkmark in View Accounts Not in Report, click OK and Go.
- When you run a General Ledger report, the General Ledger Reports tab will allow you to drill down and see account detail. Click on an amount on the report and the right side of the screen will display account details. This journal detail can be printed/exported using appropriate buttons located at the bottom of the Journal Details pane.
- You now can link General Ledger Reports to access buttons.
- When you create new General Ledger reports, you can select one or more Sites/Services to be included in the report, but do not have to select one or all.
- When you create a new report and select specific Site(s)/Service(s) to be included, the account number pick list will only include accounts associated with the selected Site(s)/Service(s).
- General Ledger Reports now have an option to allow you to force a date rather than defaulting to the current month. Within General Ledger Report setup, the Options button has a new Date Selection area. Options are Current Month, Last Month, Last Year, and Force Date Selection. Existing General Ledger reports will default to the Current Month setting. Force Date Selection prompts a user to pick the date to run the report for each time it is run.
- When you make changes to an existing report or create a new report, ECS will prompt you to save before you can exit. This will reduce the chance of making changes and not saving them before exiting.
- When creating a GL report, there is a new option that allows you to add rows based on Account Types. This means a report can be set up to pull all accounts that are Assets for example, without having to tie the report to individual account numbers. When a row is set to Account Type, there are options to Include Calculated Accounts or Only Show Calculated Accounts.

Vendor Demographics

- We have reduced the size of the Vendor Demographics screen. This was done as most of the data on this screen is now entered into a documenting screen. There is a More/Less button in the bottom left side of the screen if this is used and data needs to be viewed/updated.
- There is an Accounts button in Vendor Demographics that has been added. This allows you to define what Expense Accounts are associated with a vendor. When entering vendor invoices into ECS, you would then only be presented with those accounts, rather than having to pick through all Expense Accounts. You also can see additional expense accounts not tied to the Vendor if needed. Setup Notes, only accounts set with "AP" in the Account Number Setup will be available to be linked to a Vendor. Only accounts for the Site/Service the Vendor are affiliated with are available.
- If a Vendor only has 1 account linked in Vendor Demographics, when charting that account will automatically be selected to that the user can simply click OK.

Word Properties for Accounts Payable and General Ledger

- There is a new checkbox in word properties on the Text Control tab called Chart of Accounts AP that is used to display accounts that are set with the "AP" option within the Account Number setup. This is used in documenting to display a list of Expense Accounts for entering Vendor Demographics. Accounts for the Site/Service the vendor is affiliated with be displayed.
- Clearing/Reconciling tasks can now be linked to Access buttons.
- General Ledger Reports can now be linked to Access buttons.

ECS Mobile

The desktop version of ECS was enhanced with the following features that have now also been carried over into the ECS mobile environment:

- The "Identifier Only" option displays correctly in reports.
- The "First Last" name option displays correctly in reports.
- Buttons that are setup with a hyperlink will now launch that link.
- If a topic is setup to only send entries if contraindication warnings are triggered, the entry will no longer send for every entry made.
- When compare entries are sent, they will no longer incorrectly send multiple messages.

Contact Information

Email Addresses

- Signing up for E-mail Lists: CARES@american-data.com
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- Financial Support: financial@american-data.com

Phone Number

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